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Foreign CROPS AND MARKETS



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FOR RELEASE

MONDAY

MAY 2, 1949

UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D. C.

WORLD GRAIN EXPORTS CONTINUE AT HIGH LEVEL 1/

Despite the substantial improvement in food production in most countries in 1948, world exports of grain and grain products, exclusive of rice, during the first 6 months (July-December) of the 1948-49 season were even greater than during the corresponding half of the 1947-48 season. Export shipments during the first half of the current season amounted to 17.9 million long tons compared with 17.1 million tons during the corresponding period a year ago, an increase of about 5 percent.

Almost 90 percent of the current season's exports originated in the 4 principal surplus-producing countries--the United States, Canada, Argentina and Australia. In the same period last season, those countries accounted for more than 93 percent of the world shipments. The reduction in the share moving from the "Big Four" this year is due mainly to reduced exports from Argentina. However, a somewhat larger movement of grain into export channels from countries other than the "Big Four" was also a contributing factor.

Table 1. Origin of World Exports of Grain and Grain Products
(July-December, 1947 and 1948, in grain equivalent)

Period and origin	Breadgrains		Coarse grains		All grains	
	Long tons	Percent	Long tons	Percent	Long tons	Percent
<u>First half</u>						
<u>1947-48</u>						
United States	6,903,000	55.0	1,598,000	35.1	8,501,000	49.7
Canada.....	2,985,200	23.8	29,400	0.6	3,014,600	17.6
Australia.....	753,500	6.0	50,700	1.1	804,200	4.7
Argentina.....	1,374,900	10.9	2,257,400	49.6	3,632,300	21.2
All others.....	541,000	4.3	617,000	13.6	1,158,000	6.8
Total.....	12,557,600	100.0	4,552,500	100.0	17,110,100	100.0
<u>First half</u>						
<u>1948-49</u>						
United States	7,266,000	55.6	1,496,000	30.7	8,762,000	48.9
Canada.....	2,759,100	21.1	522,400	10.7	3,281,500	18.3
Australia.....	1,679,000	12.9	228,800	4.7	1,907,800	10.6
Argentina.....	552,700	4.2	1,531,600	31.5	2,084,300	11.6
All others.....	311,000	6.2	1,052,000	22.4	1,903,000	10.6
Total.....	13,067,800	100.0	4,870,800	100.0	17,938,600	100.0

1/ July-November shipments for Australian coarse grains.

From various official sources including the records of the International Emergency Food Committee.

1/ A more extensive statement containing country details is obtainable from The Office of Foreign Agricultural Relations.

(Continued on Page 437)

WORLD TRADE IN TOBACCO DECLINES IN 1948

World trade in unmanufactured tobacco in 1948 totaled about 1 billion pounds and was about 7 percent below the movement in 1947 and 11 percent below the prewar, 1935-39, average. Exports from the principal countries totaled 1,008,576,000 pounds in 1948, compared with 1,081,592,000 pounds in 1947 and a prewar, 1935-39, annual average of 1,128,722,000 pounds.

The decline in 1948 resulted primarily from restrictions by most importing countries on the use of dollar exchange for the purchase of tobacco from the United States and other principal surplus producing countries in the Western Hemisphere. Increases in 1948 exports occurred from Oriental-type tobacco producing countries of Southeastern Europe and the Near East, and the surplus-producing countries of Southern Africa.

On the import side, decreased takings in 1948 were recorded for all of the major geographic divisions of the world except Africa and Oceania. Increased imports into Africa resulted from larger importations by French Morocco, Tunisia, the Belgian Congo and the Gold Coast. Larger importations by Australia resulted in the increase recorded for Oceania. Most of the decrease in importations recorded for 1948 resulted from sharply curtailed importations into Europe and Asia. In several of the European and Asiatic importing countries a substantial part of leaf tobacco consumed in 1948 was accounted for by stock reduction rather than maintaining imports at the consumption level.

World totals for the countries listed in the accompanying table show exports consistently above imports. The discrepancy results from a number of factors including re-exports (which had not been shown as imports) in the export data, the omission of relatively large imports into the Soviet Union for which data are not available, and the omission from the table of a number of countries which have a small trade in tobacco and whose imports materially exceed exports.

Principal Exporting Countries: In 1948, the United States continued to be the leading tobacco exporting country. Exports for the year, however, were substantially below 1947 exports, and comprised only 42 percent of the world total as compared with 47 percent in 1947. The decline was due to import restriction on the purchase of tobacco from dollar areas imposed by a number of important importing countries, their increasing imports of tobacco from soft currency surplus-producing countries to be used as a substitute for United States leaf and increased leaf production in several importing countries. United States exports in 1948 totaled 426,609,000 pounds, as compared with 507,286,000 pounds in 1947 and an annual average of 420,797,000 pounds in the prewar, 1935-39, period. Of the total 1948 exports, flue-cured leaf accounted for about 343,000,000 pounds or 80 percent of the total, compared with about 400,000,000 pounds or 79 percent of the total in 1947. Burley leaf exports in 1948 totaled 23,400,000 pounds or about 5 percent of the total, compared with 43,000,000 pounds or about 8 percent of the total in 1947. Exports of fire-cured leaf totaled 27,600,000 pounds in 1948, compared with about 30,000,000 pounds in 1947.

UNMANUFACTURED TOBACCO: International trade, average 1935-39, annual 1947 and 1948						
Continent and	Average 1935-39		1947		1948	
Country	Exports	Imports	Exports	Imports	Exports	Imports
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
North America						
Canada	15,294:	4,255:	24,493:	1,610:	15,877:	1,568
Costa Rica	-	40:	-	95:	5:	78
El Salvador	23:	495:	-	2,096:	-	2,712
Guatemala	-	63:	-	273:	-	450
Honduras	1,394:	43:	3,737:	60:	4,444:	-
Mexico	215:	210:	649:	1,380:	327:	2,537
Newfoundland and Labrador	-	62:	-	1,166:	-	2/ 1,500
Nicaragua	-	175:	-	453:	-	504
United States	420,797:	71,274:	507,236:	90,386:	426,609:	84,342
Cuba	27,712:	-	31,667:	-	32,322:	-
Dominican Republic	13,652:	-	32,985:	183:	30,504:	2/ 200
Total	479,587:	76,622:	600,517:	98,202:	510,083:	93,941
Europe						
Austria	3/ 1,424:	3/ 16,954:	-	6,264:	-	10,133
Belgium and Luxembourg	413:	40,695:	53:	39,694:	344:	41,155
Bulgaria	59,396:	-	72,007:	-	2/ 75,000:	-
Czechoslovakia	-	3/ 20,768:	-	46,086:	-	21,473
Denmark	490:	20,206:	-	18,932:	269:	20,023
Eire	3/ 394:	3/ 12,292:	340:	14,417:	337:	12,481
Finland	-	7,754:	-	6,823:	-	14,618
France	3/ 686:	3/ 61,576:	116:	63,486:	1,911:	28,117
Germany	3/ 19:	3/ 204,644:	-	4/ 3,194:	-	4/ 14,969
Greece	97,657:	20:	33,732:	-	40,751:	-
Hungary	19,162:	3,106:	677:	851:	5/ 5,000:	5/ 2,400
Italy	12,927:	5,253:	2,955:	29,326:	2,006:	27,117
Netherlands	3,249:	67,349:	-	76,189:	362:	34,207
Norway	-	6,602:	-	9,113:	-	8,965
Poland and Danzig	3/ 149:	3/ 18,404:	-	8,311:	-	6,592
Portugal	-	6,381:	-	10,062:	-	5/ 11,500
Spain	-	2/ 30,979:	-	56,502:	-	5/ 35,000
Sweden	153:	14,829:	455:	19,363:	-	18,845
Switzerland	-	15,795:	-	19,167:	-	18,686
United Kingdom	5,996:	258,486:	899:	295,621:	994:	280,585
Total	202,115:	312,093:	116,234:	729,401:	127,474:	606,366
Asia						
Syria and Lebanon	2,762:	112:	6,243:	300:	5,593:	507
Turkey	78,054:	152:	93,239:	-	108,395:	-
Ceylon	2,086:	1,200:	1,124:	2,086:	1,041:	1,577
China	30,994:	56,613:	1,155:	41,475:	5/ 1,300:	5/ 23,000
French Indochina	3/ 216:	2,718:	-	8,732:	-	7,242
Hong Kong	6/	10,450:	337:	10,437:	1,374:	7,260
India	43,500:	4,791:	49,945:	12,789:	5/ 50,000:	5/ 11,000

UNMANUFACTURED TOBACCO: International trade, average 1935-39, annual 1947 and 1948

Continent and Country	Average 1935-39	1947	1948	1/
	Exports : Imports	Exports : Imports	Exports : Imports	Exports : Imports
	1,000 : 1,000	1,000 : 1,000	1,000 : 1,000	1,000 : 1,000
	pounds : pounds	pounds : pounds	pounds : pounds	pounds : pounds
Asia (cont'd)				
Indonesia	101,176: 2,765:	4,885: 3,189:2/	6,000:2/ 4,400	
Philippine Republic	37,357: 1,075:	10,254: 101:5/	6,700:5/ 100	
Thailand (Siam)	13: 3,405:	- : 3,307:	- : 1,764	
Total	296,158: 83,281:	167,232: 82,416:	180,403: 56,850	
South America				
Argentina	180: 16,878:	4,489: 17,504:5/	2,400:5/ 12,000	
Brazil	71,955: 772:	82,860: 664:	54,789:2/ 500	
British Guiana	- :3/ 393:	- : 780:	- : 639	
Chile	- : 172:	- : 840:	- : 840	
Colombia	6,472:3/ 138:	8,583: 363:2/	10,000:2/ 400	
Paraguay	7,747: 202:	7,738:2/ 140:	5,304:2/ 140	
Peru	- : 212:	- : 569:	- : 789	
Surinam	6/ - :	- : 121:	- : 158	
Uruguay	- : 3,051:	- : 4,353:	- : 4,326	
Total	86,354: 21,818:	103,670: 25,334:	72,493: 19,792	
Africa				
Algeria	24,979: 7,482:	20,507: 7,671:	17,778: 7,606	
French Morocco	- :3/ 3,921:	- : 6,922:	252: 8,810	
Belgian Congo	- :2/ 1,000:	17: 2,692:5/	18:5/ 4,800	
Nyasaland	12,810: - :	20,008: 14:2/	20,000:2/ 20	
Egypt	- : 13,014:	- : 24,923:	- : 24,220	
Gold Coast	- : 1,471:	- : 1,213:	- :2/ 1,600	
Madagascar	5,262: 17:	3,115: - :5/	6,800: -	
Northern Rhodesia	1,429: - :	3,335: - :5/	5,200: -	
Southern Rhodesia	19,166: 327:	46,657: 1,064:	67,661: -	
Tunisia	- :3/ 2,843:	- : 5,114:	118: 7,747	
Union of South Africa	635: 3,100:	- : 6,463:	- :2/ 6,500	
Total	64,281: 33,175:	93,639: 56,076:	117,827: 61,303	
Oceania				
Australia	114: 21,537:	- : 21,333:	291: 29,941	
New Zealand	113: 3,027:	- : 4,651:	- : 4,346	
Total	227: 24,564:	- : 25,984:	291: 34,287	
Total countries shown	1,128,722:1,051,553:	1,081,592:1,017,413:	1,008,576: 873,039	

1/ Preliminary. 2/ Approximated from unofficial information. 3/ Less than a 5-year average. 4/ Bizone Germany only; data for Russian Zone not available. 5/ Estimated on basis of data available for 6 months or more of the year. 6/ Not available.

Office of Foreign Agricultural Relations. Prepared or estimated from official Statistics of foreign governments, reports of United States Foreign Service officers and other information.

Shortage of dollar exchange and import restrictions in Europe and elsewhere also curtailed exports from the Latin American countries. Decreases from 1947 levels were reported for most of the principal exporting countries including Argentina, Brazil, the Dominican Republic and Paraguay. The bulk of the exports from Latin America continued to go to Western European countries.

All of the principal Oriental type tobacco producing countries--Bulgaria, Greece and Turkey--are reported to have had larger exports in 1948 than in 1947. In the cases of Bulgaria and Turkey, 1948 shipments were far above prewar. Exports from Greece were still only about 42 percent of prewar, due to lower postwar production.

Exports from the Far Eastern countries in 1948 totaled about the same as in 1947, but exports from these countries were only a fraction of prewar. The 1948 exports from Indonesia are reported to be only about 6 percent of the prewar, 1935-39, average, and exports from the Philippine Republic only about 18 percent of the 1935-39 average. The 1948 exports from China are reported to be only about 4 percent of the 1935-39 average.

Principal Importing Countries: Imports in 1948 by the United Kingdom totaled 280,585,000 pounds, which exceeded any other individual country and accounted for 32 percent of the total imports shown in the accompanying table. Imports in 1948 were 5 percent below the 1947 total of 295,621,000 pounds but about 9 percent greater than the prewar, 1935-39, average. Imports of United States leaf by the United Kingdom accounted for about 60 percent of the country's total as compared with 67 percent in 1947 and 78 percent in the 1935-39 period.

Imports in 1948 into the United States, which ranks after the United Kingdom as an importing country, totaled 84,342,000 pounds which was 7 percent below 1947 imports but 18 percent greater than in the 1935-39 period.

All Other Leading Importing Countries: Imports in 1948 exceeded 1947 in the cases of Austria, Belgium and Luxembourg, Denmark, Germany, French Morocco, Tunisia and Australia. Decreases were reported for Czechoslovakia, Ireland, France, Italy, the Netherlands, Norway, Poland, Spain, Sweden, Switzerland, China, French Indochina, Hong Kong, India and Argentina.

This is one of a series of regularly scheduled reports on world agricultural trade approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, J. Barnard Gibbs, Clarence E. Pike and Mary L. E. Jones.

WORLD POTATO SUPPLIES IN 1948-49 SLIGHTLY ABOVE PREWAR PER CAPITA LEVEL

World potato production in the 1948-49 season is estimated at 9.0 billion bushels or 12 percent above the prewar average of 8.0 billion bushels. This is the first crop since the war to exceed prewar levels.

The 1947-48 world potato crop was 7.3 billion bushels or 9 percent below prewar, and the 1946-47 crop was 7.1 billion bushels or 12 percent below. While this year's large crop is estimated at 12 percent above prewar, supplies per capita are not significantly larger because of the increase in world population. Total production is of less importance to a correct understanding of the current potato situation in the world, than the distribution of supplies on the various continents. For example, the 1948 crop in North America was 549 million bushels or almost 29 percent higher than the prewar production of 427 million. The United States production increased from 356 million bushels prewar to 446 million in 1948, or 25 percent. Canada increased its production from 64 million to 92 million or 44 percent, Cuba from 2 million to 3.4 million or 70 percent and Mexico from 2.5 million to 5 million or 100 percent. These 4 countries accounted for almost all of the North American crop in 1948. Larger production in the United States resulted in considerable quantities being diverted to livestock feed and industrial utilization.

In Europe, exclusive of the Soviet Union, the 1948 crop was 5 billion bushels or about 14 percent higher than the prewar production of 4.5 billion bushels. While the continent as a whole reported an increase, several important countries reported significant decreases. Austria was down 25 percent from prewar, Belgium 15 percent, Czechoslovakia 32 percent, Luxembourg 20 percent, and Spain 36 percent. Production increased very substantially in nearly all other European countries with the possible exception of Bulgaria and Romania, from which data are not sufficiently adequate to warrant definite statements. The 1948 crop was more than double the prewar average in the Netherlands, Denmark and the United Kingdom.

In the U.S.S.R. (including both European and Asiatic Russia) the 1948 production, also estimated on the basis of rather inadequate data, was only 4 percent higher than prewar.

In Asia exclusive of Asiatic Russia the 1948-49 crop was estimated at 303 million bushels or 28 percent higher than the prewar production of 236 million bushels. Japan, North Korea, and Turkey, all indicate substantial gains. A 5 percent increase was reported also in South America and 14 percent in Oceania.

In the African area nearly every country reported large increases above prewar. The area as a whole produced 29 million bushels in 1948-49 or 80 percent more than prewar, and some of the important individual countries report even greater increases. Madagascar more than doubled its production, Egypt more than tripled, and the Union of South Africa increased by almost 60 percent. These 3 countries together in 1948-49 produced two-thirds of the total African crop.

POTATOES: Acreage, yield per acre, and production in specified countries, average 1935-39, and annual 1946 to 1948 $\frac{1}{2}$

Continent and country	Acreage			Yield per acre			Production		
	Average 1937-39	1946	1947	Average 1937-39	1946	1947	Average 1937-39	1946	1947
	1,000 acres	1,000 acres	1,000 acres	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
NORTH AMERICA									
Canada.....	516:	520:	497:	508:	125:	194:	131:	64,385:	79,938:
El Salvador.....	1:	1:	2:	2:	68:	66:	51:	50:	26:
Guatemala.....	7:	12:	12:	12:	41:	50:	50:	290:	600:
Mexico.....	37:	68:	72:	77:	66:	70:	66:	2,548:	4,740:
Newfoundland.....	20:	20:	20:	20:	109:	110:	110:	2,185:	2,200:
Panama.....	1:	1:	1:	1:	60:	127:	130:	40:	112:
United States.....	3,073:	2,598:	2,101:	2,099:	117:	182:	185:	355,540:	474,174:
Bermuda.....	1:	1:	1:	1:	125:	150:	180:	78:	60:
Cuba.....	16:	24:	25:	30:	122:	105:	120:	1,950:	2,517:
Dominican Republic.....	4:	4:	3:	3:	24:	22:	21:	96:	77:
Jamaica.....	2:	2:	2:	2:	30:	59:	59:	60:	118:
Puerto Rico.....	1:	1:	1:	1:	23:	24:	24:	23:	24:
Total North America.....	3,634:	3,252:	2,737:	2,725:	117:	174:	199:	127,179:	544,575:
EUROPE									
Albania.....	1:	3:	3:	3:	68:	55:	56:	68:	165:
Austria.....	50:	49:	49:	49:	204:	160:	180:	106,036:	65,800:
Belgium.....	191:	191:	191:	191:	395:	351:	351:	116,816:	87,000:
Bulgaria.....	1,765:	1,821:	1,821:	1,821:	200:	211:	175:	47,022:	55,531:
Denmark.....	183:	250:	252:	252:	253:	261:	256:	67,576:	67,000:
Eire.....	328:	391:	393:	393:	300:	308:	293:	94,126:	120,175:
Finland.....	251:	175:	205:	257:	238:	186:	280:	44,126:	32,688:
France.....	3,489:	2,760:	3,104:	2,950:	165:	168:	171:	718,850:	482,832:
Germany (Trit-zone).....	2,829:	2,660:	2,640:	3,000:	249:	175:	300:	575,530:	571,900:
Germany (U.S.S.R. Zone).....	2,208:	2,000:	2,000:	1,987:	2:	180:	190:	534,437:	360,000:
Greece.....	53:	74:	83:	68:	101:	118:	128:	164:	5,372:
Hungary.....	724:	300:	658:	714:	108:	86:	59:	78,264:	42,005:
Italy.....	1,040:	998:	1,034:	1,003:	97:	86:	100:	70,917:	86,092:
Luxembourg.....	36:	20:	20:	22:	206:	247:	200:	267:	4,931:
Malta and Gozo.....	9:	9:	9:	9:	110:	111:	111:	994:	1,000:
Netherlands.....	323:	467:	498:	492:	312:	334:	340:	394:	155,967:
Norway.....	127:	154:	140:	160:	258:	237:	333:	83,430:	44,239:
Poland.....	6,810:	4,114:	5,690:	6,123:	131:	167:	161:	894,113:	687,438:
Portugal.....	77:	221:	237:	230:	270:	156:	158:	20,777:	34,539:
Rumania.....	595:	509:	578:	441:	133:	94:	104:	73,794:	27,292:
Spain.....	1,125:	820:	888:	890:	152:	95:	105:	128:	170,978:
Sweden.....	328:	394:	392:	365:	201:	201:	184:	70,585:	71,320:
Switzerland.....	120:	196:	161:	225:	20:	274:	283:	20,430:	33,676:
United Kingdom.....	735:	1,423:	1,530:	1,548:	294:	218:	289:	138,669:	373,531:
Yugoslavia.....	1,303:	730:	1,200:	851:	63:	93:	58:	103,972:	103,086:
Total Europe (excl. U.S.S.R.).....	25,198:	20,371:	23,581:	24,456:	171:	181:	203:	1,451,251:	1,771,460:
U.S.S.R. (Europe and Asia).....	21,232:	18,955:	20,594:	22,500:	131:	122:	128:	128:	2,530,000:
									2,530,000:

ASIA	6	6	7	155	200	214	191	958	1,200	1,266	1,340
Cyprus.....	6	6	7	155	200	214	191	958	1,200	1,266	1,340
Malayan.....	12	11	11	68	110	110	120	316	1,280	1,280	1,340
Philippine.....	2	12	10	131	150	140	130	269	1,800	1,400	1,340
Sri Lanka.....	5	8	8	145	67	103	84	715	555	800	700
Turkey.....	136	149	149	89	89	86	107	6,640	12,089	12,827	16,975
Manchuria.....	800	950	950	100	100	93	93	60,000	80,000	83,000	88,000
India.....	440	450	405	150	150	146	168	67,349	65,000	65,000	68,000
Japan.....	388	361	361	136	136	144	143	64,108	64,678	60,941	80,028
North Korea.....	343	358	373	69	68	71	93	23,700	23,112	25,463	34,576
South Korea.....	47	108	115	123	73	72	68	7,709	7,933	8,301	8,310
Karafuto (Japanese Sichuan).....	10	10	10	127	130	130	130	1,300	1,300	1,300	1,300
Kwantung Leased Territory.....	6	15	15	73	69	60	55	1,701	1,701	1,701	1,701
Formosa.....	30	15	15	73	69	60	55	2,830	900	900	900
Philippines.....	11	11	11	70	60	60	60	2,830	900	900	900
Total Asia (excl. U.S.S.R.).....	2,030	2,344	2,633	116	110	108	115	275,904	258,023	282,274	302,917
SOUTH AMERICA	375	425	449	71	68	92	63	26,923	29,911	39,267	30,717
Argentina.....	65	150	150	52	93	98	92	3,396	14,000	14,000	14,000
Bolivia.....	168	217	220	129	157	157	161	15,652	20,915	20,466	20,000
Chile.....	121	133	130	124	157	157	161	15,652	20,915	20,466	20,000
Colombia.....	170	237	240	79	70	73	73	13,471	16,534	17,637	17,000
Ecuador.....	80	62	60	60	55	51	50	4,400	3,380	3,042	3,000
Paraguay.....	1	1	1	75	44	90	58	78	16,000	22,450	20,209
Peru.....	400	360	360	360	40	62	56	25,000	1,351	1,099	1,351
Uruguay.....	18	20	24	63	55	53	53	500	500	500	500
Venezuela.....	10	10	10	70	60	94	72	105,759	116,343	134,535	121,354
Total South America.....	1,406	1,659	1,620	1,618	72	83	72	105,759	116,343	134,535	121,354
AFRICA	40	30	50	109	100	100	80	4,349	3,000	5,000	4,000
Algeria.....	3	7	7	81	77	62	62	244	232	450	1,56
Belgian Congo.....	4	8	7	75	100	114	119	300	800	800	950
Kenya.....	1	1	1	65	77	70	70	25	27	70	70
Uganda.....	10	30	34	172	153	176	176	1,723	4,600	5,933	6,000
Eritrea and Italian Somaland.....	1	8	11	117	127	118	117	7	1,014	1,300	1,400
French Morocco.....	4	9	12	135	82	122	123	625	735	1,470	1,600
Madagascar.....	33	40	50	50	52	40	74	1,718	1,600	3,675	3,675
Mauritius.....	1	1	1	131	100	100	120	31	73	100	120
Mozambique.....	2	2	2	83	58	60	60	128	115	120	122
Nigeria and Cameroons.....	1	1	1	11	36	35	37	11	36	35	37
Sierra Leone.....	2	1	1	106	60	60	60	211	193	200	200
South Rhodesia.....	1	1	1	64	49	49	49	10	6	5	7
South West Africa.....	6	5	5	64	134	76	143	35	59	59	300
Tunisia.....	89	96	145	70	123	76	143	6	11,775	10,833	9,980
Union of South Africa.....	199	229	331	339	80	92	86	15,979	24,194	30,341	28,817
Total Africa.....	1,14	145	160	113	140	116	99	12,900	20,312	18,591	15,802
OCEANIA	20	19	22	22	227	263	250	4,322	4,322	5,767	5,000
Australia.....	134	164	182	180	131	134	116	17,550	24,634	24,378	20,802
New Zealand.....	53,636	47,560	51,619	54,479	149	142	165	8,045,141	7,101,511	7,348,240	8,994,653
Total Oceania.....	53,636	47,560	51,619	54,479	149	142	165	8,045,141	7,101,511	7,348,240	8,994,653

1/ Years shown refer to year of harvest in the Northern Hemisphere and includes the harvest immediately following in the Southern Hemisphere.
 2/ Yields per acre for countries having a small production were calculated on the basis of unrounded estimates of average.
 3/ Five-year average 1935-39 used except in a few cases for which data for all five years were not available.
 4/ Preliminary.
 5/ 1940-44 average.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research, and other information.

WORLD SOYBEAN PRODUCTION REACHES ALL-TIME HIGH

World soybean production reached an all-time high of approximately 593 million bushels in 1948, according to a revised estimate of the Office of Foreign Agricultural Relations. The 1947 output is now placed at 538 million bushels. Canada and the United States harvested record crops and China, now second in world soybean production, had the largest crop in more than a decade.

Canada's 1948 soybean estimate has been revised upward to 1.8 million bushels. This is 64 percent greater than the soybean crop of the preceding year and is Canada's largest. Canada, however, is still a net importer of soybeans and soybean oil. Growers are being asked to expand their acreage as much as possible in 1949 in order to minimize reliance on imported edible oils. Soybeans are one of the few sources of edible oils, suitable for use in the manufacture of margarine, that can be grown profitably in Canada. Some expansion in acreage possible, but Ontario farmers are not expected to rush into soybean production because of the unsettled price situation. Imports of soybeans and oil, therefore, are almost certain to establish new records in 1949.

The United States produced more than 220 million bushels of soybeans and reached first place in world output in 1948. The record crop was brought about by exceptionally high yields since the area harvested for beans (10.3 million acres) was 8 percent less than in 1947. The yield of 21.4 bushels per acre is also an all-time high for this country.

The 1949 prospective soybean acreage of 9,774,000 acres is 5 percent less than last year's harvested acreage.

The support level for 1949-crop soybeans grading U. S. No. 2 and containing not more than 14 percent moisture will be 90 percent of the comparable price for all soybeans on September 1, 1949. Premiums and discounts will apply to other grades. The price support for 1948-crop green and yellow soybeans grading U. S. No. 2 and containing not more than 14 percent moisture was \$2.18 per bushel.

The 1948 soybean production in European countries was negligible. Hungary reported a crop of 90,000 bushels, 11 percent above that of 1947. Italy's crop was only 107,000 bushels compared with 150,000 a year earlier. There is an indication that Austria increased soybean production in 1948.

Asiatic soybean crops are larger than in recent years but except in China and Turkey are not yet equal to prewar output.

China's 1948 soybean crop of almost 211 million bushels is the largest since the middle 1930's, despite a 3 percent acreage reduction from 1947. China (excluding Manchuria) was the world's foremost soybean producer until 1948 and is still the largest consumer.

SOURCES: Acreage, yield per acre, and production in specified countries, year of harvest, average 1935-39, annual 1945-46

Continent and country	Acreage			Yield per acre			Production		
	Average 1,000	1945 acres	1946 acres	1947 acres	1948 acres	Average 1,000	1945 bushels	1946 bushels	1947 bushels
NORTH AMERICA									
Canada.....	101	10,661	9,806	11,212	10,311	20.7	214	207	214
United States ^{2/}	3,042	10,661	9,806	11,212	10,311	18.5	18.3	18.3	18.3
EUROPE									
Belgium.....	34	17	45	70	70	12.1	3.3	8.2	3.4
Hungary.....	14	6	5	5	5	16.9	8.6	10.4	10.1
Italy.....	5	2	2	7	7	12.1	15.4	15.8	20.9
Russia.....	49	-	-	-	-	9.5	-	-	-
U.S.S.R. (Europe and Asia).....	60	-	-	-	-	-	-	-	-
ASIA									
Turkey.....	1	2	-	5	5	29.0	9.0	-	10.8
China proper (22 provinces).....	12,411	9,967	11,995	11,611	11,309	16.7	16.4	17.0	17.3
Manchuria.....	8,992	8,167	7,187	6,662	6,662	16.8	15.6	17.1	17.9
Japan.....	812	684	575	601	598	12.4	9.6	13.3	11.6
Korea.....	1,921	694	633	633	633	10.0	7.6	8.6	6.0
Indonesia ^{3/}	889	321	553	700	900	10.9	7.0	7.6	9.6
AFRICA									
Tanganyika.....	-	-	-	-	-	-	-	-	-
Union of South Africa.....	-	-	9	-	-	-	-	-	-
World total ^{2/}.....	23,100	32,100	32,100	33,400	32,600	-	-	-	-

^{1/} Preliminary. ^{2/} Average of less than 5 years. ^{3/} Acreage harvested for beans. ^{4/} One year only. ^{5/} Less than 500 acres. ^{6/} Partly estimated. ^{7/} Beginning with 1945 figures represent South Korea only. ^{8/} Java and Madura. ^{9/} Includes estimates for the above countries for which data are not available and for minor producing countries.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research, or other information. Preliminary estimates for countries having changed boundaries have been adjusted to conform to present boundaries, except as noted.

The 1948 estimate for Manchurian soybean output is not available. It seems quite likely, however, that production was less than the relatively small harvest of 119 million bushels a year earlier. There has been a tendency to divert to foodgrains land normally planted to soybeans chiefly because of the difficulty in marketing the beans. Typhoon and floods in some parts of the country probably reduced the crop.

Japanese soybean production has increased since 1945 but has not reached the prewar average. The 1948 estimate of 8.7 million bushels is 1.6 million bushels larger than the output in 1947.

Soybean production in South Korea showed a marked increase in 1948. The preliminary estimate is 9.6 million bushels compared with 5.0 million in 1947. The crop produced in this part of Korea is now utilized within the country. It is estimated that about 40 percent is consumed on farms and a large percentage enters commercial channels where it is used in the manufacture of soya sauce, paste, and other edible products.

Indonesia (Java) soybean production has gradually recovered from the low output of 2.2 million bushels in 1945, and the 1948 crop is estimated at 7.7 million or only 20 percent less than the 1935-39 average. A large crop was anticipated but drought reduced the yield in some areas and several thousand acres were destroyed by rodents. No exportable surplus was available from the 1948 crop.

Turkey has increased soybean production during the last 2 years. The 1948 harvest was 68,000 bushels compared with 55,000 a year earlier and 16,000 in 1946. Soybean exports amounted to 36,000 bushels in 1948, and 18,000 bushels in 1947.

Brazil has grown soybeans for more than a decade, but production was negligible until the last 2 years when there was a marked increase, especially in Rio Grande do Sul. The 1948 crop for all Brazil is estimated at 690,000 bushels compared with 480,000 in 1947 and 147,000 in 1946.

The upward trend in soybean production in Rio Grande do Sul, with output in 1948 estimated by trade sources at approximately 660,000 bushels, is believed to be continuing in 1949. The area planted is reported to be 25 to 35 percent above that of last year.

Only 2 countries in Africa appear interested in growing soybeans. Tanganyika's production amounted to 15,000 bushels in 1946, then increased to 27,000 in 1947 and to 97,000 bushels in 1948. Of this crop 35,000 bushels were designated for export, probably to the United Kingdom.

Soybean production in the Union of South Africa has not been reported for 1948. In 1947, however, the output was 933,000 bushels compared with 56,000 a year earlier, which indicates an increasing interest in the crop.

Cultivation of soybeans in Australia is still in the experimental stage and is confined to certain districts in New South Wales and Queensland where production totaled only 500 bushels in the 1947-48 crop year.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Regina H. Boyle, Helen Francis, and John C. Hobbes.

WORLD TALLOW PRODUCTION 1/

The world production of tallow and grease in 1948 is estimated at 2,050,700 short tons 2/. This output, at approximately the same level as that of 1947, was more than 30 percent above prewar production. Western Hemisphere production in 1948, estimated at 1,493,600 short tons, represented a decrease of 2 percent from that of 1947, but was 79 percent above the average prewar output of 833,900 tons. The Eastern Hemisphere output last year, at 557,100 tons, was slightly more than in 1947 and 23 percent below prewar. Improved feed supplies should permit greater numbers of some livestock and the better conditioning of animals which, because of heavier weights, should result in greater tallow production in 1949.

The United States is the world's leading producer of tallow. In 1948, production of tallow and greases in the United States totaled about 1.0 million short tons, of which approximately one-third consisted of greases. The tallow output of the rest of the world in 1948 totaled approximately the same figure. The total output of tallow in Europe, to which every country there contributes in some degree, has never been large enough to supply Europe's requirements.

1/ A more extensive statement can be obtained from the Office of Foreign Agricultural Relations.

2/ This survey deals with edible and inedible tallow, oleo stock, and derived products, such as oleo stearine and oleo oil. A world survey of this nature presents certain difficulties owing to the lack of uniformity in processing and in statistical classification in different countries.

In many cases animal fats could not be separated statistically. In other instances the question arose whether or not certain fatty animal substances should be classified as tallow. In the United States tallow and grease production are estimated as an aggregate, with grease derived mainly from hogs.

TALLOW: Estimated production by specified countries,
average 1935-39; annual 1946-48

Continent and country	Average 1935-39	1946	1947	1948
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
NORTH AMERICA				
Canada.....	1/	44.8	40.5	43.8
Mexico.....	32.0	37.9	37.2	44.4
United States.....	548.8	891.0	1,103.8	1,039.9
Cuba.....	5.5	4.5	3.0	5.1
Dominican Republic.....	.1	.5	.6	.4
Total North America 2/.....	626.4	1,003.7	1,215.1	1,163.6
EUROPE				
Austria.....	7.7	4.4	4.6	4.6
Belgium.....	11.0	5.0	8.0	8.0
Czechoslovakia.....	12.5	3.9	6.6	13.2
Denmark.....	22.0	20.0	25.0	15.4
Finland.....	3.3	1.1	1.1	2.2
France.....	65.0	33.0	38.5	45.0
Western Germany.....	80.0	22.0	26.5	22.0
Greece.....	16.5	3.3	5.5	8.8
Ireland.....	4.0	3.7	4.0	4.0
Italy.....	33.6	8.3	16.5	27.6
Netherlands.....	13.2	6.1	7.6	8.6
Norway.....	4.4	1.5	2.0	1.8
Poland (1946 Frontier).....	16.5	7.0	7.5	8.0
Portugal.....	3.3	2.2	3.3	3.3
Spain.....	16.5	10.5	13.2	15.4
Sweden.....	10.0	11.0	11.9	9.4
Switzerland.....	5.0	2.6	4.2	4.0
United Kingdom.....	38.0	33.0	27.6	27.6
Yugoslavia.....	4.0	2.5	2.6	3.0
Total Europe 2/ (excl. U.S.S.R.).....	386.5	191.1	231.2	246.9
U.S.S.R. (Europe and Asia).....	102.0	85.0	93.6	97.7
ASIA				
China.....	100.0	70.0	70.0	70.0
Manchuria.....	5.0	4.0	4.0	4.0
Indonesia.....	1.0	1.0	1.0	1.0
Japan.....	6.8	1.5	2.0	2.0
Philippine Islands.....	1.0	1.0	1.0	1.0
Total Asia 2/ (excl. U.S.S.R.).....	118.8	82.5	83.0	83.0
SOUTH AMERICA				
Argentina.....	98.0	180.0	200.0	220.0
Brazil.....	45.0	42.5	41.9	42.0
Chile.....	12.0	4.0	4.0	4.0
Colombia.....	13.2	16.7	17.9	18.0
Uruguay.....	19.3	16.0	16.0	16.0
Total South America.....	207.5	289.2	309.8	330.0
AFRICA				
Madagascar.....	2.0	.8	.8	.8
Union of South Africa.....	6.0	12.0	12.0	12.0
Total Africa 2/.....	18.0	22.8	22.8	22.8
OCEANIA				
Australia.....	61.0	50.0	56.0	51.0
New Zealand.....	36.0	55.7	55.7	55.7
Total Oceania.....	100.0	105.7	111.7	106.7
World total.....	1,559.2	1,780.0	2,067.2	2,050.7

1/ No basis for estimate. 2/ Includes estimates for the above countries for which data are not available and for minor producing countries.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research, and other information.

Production of tallow and greases in the United States, the bulk of which is consumed domestically, was somewhat less in 1948 than in 1947. Production in the last 2 years has been about double the prewar 1935-39 average. The increase is attributed to larger numbers of cattle and hogs and to greater recovery of fat per animal slaughtered. A large part of the tallow output of the United States in recent years has consisted of inedible tallow and greases, and the remainder has been edible tallow, oleostearine, oleo stock and oleo oil. Edible tallow and oleo stock output have declined gradually, reflecting a lessening demand for animal fats in the manufacture of margarine and compounds.

Domestic production of tallow in Canada is still insufficient to meet demand and considerable importation is necessary. The withdrawal of the embargo on export of cattle and dressed meat in 1948 should further reduce domestic production. Production in 1948 was above that of 1947, or 43,800 tons in 1948 compared to 40,500 in 1947.

In Mexico production of 44,400 tons in 1948 was 7,000 tons above the 1947 output. A return to normal operation of slaughterhouses in the major areas affected by the foot and mouth disease as a result of the change from eradication to a control program resulted in an increase in tallow output in 1948. Estimated domestic production of tallow has increased steadily in recent years.

Argentina, ranking second in the production of tallow, has been the most important source of tallow for international trade. The 1948 total beef and mutton fat production in Argentina for 1948 was estimated at 220,000 short tons, of which 90,000 to 100,000 tons was inedible and 130,000 to 120,000 tons primer jus and edible tallow. With a decline in livestock slaughter in Argentina in 1948, a corresponding drop was evident in the output of tallow. The proportion of edible production consumed domestically averages about 60 percent, and the balance is exported.

The other main producers of tallow in South America are Brazil, Colombia, and Uruguay. Brazil has maintained a production of around 42,000 tons annually, while Colombia's and Uruguay's output has ranged from 16,000 to 18,000 tons annually. Chilean production of tallow is about 4,000 tons annually. Because of the current shortage of fats and oils of all kinds, the exportation of tallow has been prohibited by Chilean Government decree.

Australia and New Zealand are both heavy producers of tallow. Australia's postwar output averaged around 52,000 tons a year and that of New Zealand 55,700. The fact that tallow output in New Zealand has risen so far above prewar figure of 36,000 tons is attributed to a great increase in the boning out and dehydration of meat. In New Zealand the Government purchases tallow for export. The United Kingdom purchased from the New Zealand Government the entire 1947-48 season's exportable surplus. Practically all edible beef tallow has been required for manufacture in New Zealand, in addition to considerable quantities of edible mutton tallow.

The average annual production of tallow in Europe in 1935-39 was estimated at around 386,500 tons. Of this amount Germany was the main producer, followed by France, the United Kingdom, and Italy. Output declined in the majority of European countries during the war owing to the shortage of feedstuffs, especially imported oil cake and grains in western Europe, and reduced cattle numbers. The production of slaughter fats is still at a reduced level as conditions remain unfavorable for fattening. However, output has increased steadily each year and was estimated at 246,900 tons in 1948. European imports, principally from the United States, South America, Australia, and New Zealand, exceeded exports in 1947.

Little information is available on tallow production in Asiatic countries. The cattle population of India is the largest in the world, but Hindus, who constitute the majority of the population of India, prohibit the slaughter of livestock because of their religious beliefs. Cattle and buffaloes, when too old to serve as draft animals, are often retired to "old age" homes. Consequently, tallow output is extremely small in comparison with livestock numbers.

The cattle population of China, including Manchuria, is the sixth highest in the world and ranks just below that of Argentina. There is no large-scale commercial tallow production in China because output is primarily consumed locally. China exported small amounts of tallow to Japan during the war. Cattle numbers in Japan are small in comparison with other Asiatic countries. Prewar tallow output totaled about 6,800 short tons. Production was only about 1,500 tons in 1946 and was estimated at 2,000 tons in 1948.

The Union of South Africa is by far the leading producer, consumer, and importer of tallow in Africa. Although official figures are not available regarding tallow production, livestock numbers in 1947 were estimated to be over 1.2 million head. Other important cattle-raising regions in Africa, for which tallow production data are not available, include Tanganyika, Kenya, Southern Rhodesia, Egypt, Morocco and Ethiopia. Current production of tallow in Madagascar remains much below the prewar average. Most of the tallow output, approximately 800 tons in each of the postwar years, was used locally in the manufacture of soap and crude candles while some was exported. Small quantities of tallow were imported by Egypt, French West Africa, Mauritius, Zanzibar, and the Union of South Africa.

Tallow production in the Soviet Union in prewar years is believed to have averaged 102,000 short tons. This would place the Soviet Union slightly above Argentina and second only to the United States in world tallow production during 1935-39. Beef tallow constituted roughly 65 percent of the output. The limited information available indicates that the Soviet Union is making considerable progress in rebuilding the cattle herds which were devastated or reduced during the war years. The increase in cattle numbers in 1947 and 1948, particularly, reflects good grain and feed crops. Tallow production, based on estimated livestock numbers, would amount to 97,700 tons in 1948.

CROP OUTLOOK FOR EUROPE AND THE SOVIET UNION 1/

Some decline in European crop production in 1949 compared with the unusually favorable harvest of 1948 is indicated by reports on planted acreage and crop conditions as of mid-April.

Unless weather is unfavorable for crop growth during the remainder of the season, the combined production of all crops will be considerably above the unusually small output of 1947, but somewhat below the prewar average.

Reports indicate smaller seedings of winter grain than had been planned earlier and conditions in several important producing areas are somewhat below the almost uniformly favorable conditions of a year ago. The winter was mild and the abandonment of fall-sown crops was light. Winter rainfall was generally below normal and scattered spring rains have only partly relieved the shortage of subsoil moisture. Conditions for spring planting have been generally favorable but widespread rains are needed to prevent crop deterioration as the growing season progresses.

The acreage in winter grains is definitely below officially projected plans and in some countries where compulsory planting has been terminated or fall weather conditions were unfavorable, acreage is below a year ago. In several important producing countries little change in winter grains is reported but in the United Kingdom, Ireland, Sweden, Germany, and Greece, acreage is definitely below a year ago and weather conditions for fall planting were unfavorable in some of the southern and eastern European countries. Weather has favored spring planting, however, so that total crop acreage is expected to be maintained with some shift to coarse grains and other spring crops.

Present condition of winter grains in the Low Countries, Sweden, Switzerland and Austria, is good to excellent and favorable yields are indicated. Many of the major producing countries, however, report that winter rainfall was considerably below normal. Although scattered showers have provided temporary relief, widespread rains are generally needed.

While it is too early to appraise prospects for such crops as potatoes and sugar beets there are some indications of an increase in the acreage of sugar beets compared with a year ago. On the other hand, there may be some decline in the potato area in northwest Europe where supplies were unusually plentiful last year.

1/ A more extensive statement, including prospects by countries, is obtainable from the Office of Foreign Agricultural Relations.

In the Soviet Union the acreage seeded to winter grain is estimated 8 percent above 1948 winter-kill was not excessive despite shortage of winter snow cover. However, the light snowfall indicates some shortage of soil moisture. Although spring weather conditions were not fully satisfactory, the grain area seeded in early April exceeded that seeded at the same time last year by about 5 million acres.

The foregoing summary is based on reports received from U. S. Foreign Service officers and information available from other sources.

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDS

ASIA'S RICE

EXPORTS INCREASE

Rice exports of approximately 1,900 million pounds from the 3 surplus-producing countries of Asia during the first quarter of 1949 were substantially larger than the 1,430 million pounds exported in the corresponding months of 1947. Siam's deliveries more than doubled, and shipments from Burman increased somewhat. Indochina's rice exports, however, declined.

RICE: Exports from Siam, Burma, and French Indochina,
first quarter by months, 1948 and 1949

Country and month	:	1948	:	1949	:	Country and month	:	1948	:	1949
		: Million:		: Million:				: Million:		: Million:
		: pounds		: pounds				: pounds		: pounds
<u>SIAM</u>		:		:		<u>INDOCHINA</u>		:		:
January.....		121	:	226		January.....		17	:	24
February.....		141	:	328		February.....		55	:	24
March.....		162	:	346		March.....		34	:	3
Total.....		424	:	900		Total.....		106	:	51
		:		:				:		:
<u>BURMA</u>		:		:		<u>TOTAL AREA</u>		:		:
January.....		113	:	217		January.....		251	:	467
February.....		326	:	412		February.....		522	:	764
March.....		463	:	332		March.....		659	:	681
Total.....		902	:	1,961		Total.....		1,432	:	1,912

1/ Revised total for first-quarter shipments received recently is 977 million pounds, which is higher than the total of monthly shipments shown here.

Comp led from consular reports and telegrams giving monthly shipments.

Purchases of and exports from the 1948 crop in Siam continue heavy. New-crop purchases on April 3 totaled 1,920 million pounds, a 50-million-pound increase above the purchases reported on March 20. Burma's first-quarter exports were well-maintained, owing to a temporary decline in insurgent activities in late 1948, which permitted the transportation of some rice to ports.

The flow of Indochina's harvest to ports is also being affected by a military blockade in Cochinchina. Rice from that region is not moving to mills now, and milling centers are receiving only Cambodian stocks. Whether 1949-50 rice production increases or declines depends on unpredictable political developments.

BURMAN RICE EXPORTS EXPECTED TO DECLINE

Rice exports from Burma during the second quarter of 1949 are expected to decline sharply, according to the American Embassy, Rangoon. Exports during the year may not exceed 2,000 million pounds unless the civil war ends. Shipments in 1948 totaled 2,725 million pounds.

Most of the stocks built up in December and January have been exported, and the movement of rice from the interior to ports continues to be restricted. Stocks in the interior which are not moved to the mills and ports are subject to looting, deterioration from the weather, and infestation.

Stocks in Rangoon on April 1 were reported to be down to 150 million pounds, and rice is arriving at approximately 10 million pounds a month. The port of Bassein was closed during February but re-opened early in March and has been reported operating normally since then. New paddy is reported to be reaching Bassein at the rate of 65 million pounds a month. Civil disturbances have reduced paddy receipts in Akyab and Moulmein. Akyab port closes in mid-May as the monsoon approaches.

BURMA: Rice exports, by port, January-March, 1949

P O R T	1948			
	January	February	March	Total
	Million	Million	Million	Million
	pounds	pounds	pounds	pounds
Akyab.....	12	37	41	90
Bassein.....	21	4	59	84
Moulmein.....	20	48	56	124
Rangoon.....	165	351	189	705
Total.....	218	440	345	1/ 1,003

1/ Revised total for first-quarter shipments received recently is 977 million pounds; which is lower than the total of monthly shipments shown here. These monthly data may include some rough rice.

State Agricultural Marketing Board.

CANADA EXPECTS INCREASED WHEAT ACREAGE, SMALLER SEEDING OF COARSE GRAINS

Present prospects point to increased wheat acreage in Canada this year, with reduced seeding of barley, oats, and rye. The first official report on farmers' intentions to plant will be released May 12. Unofficial opinions of the probable wheat acreage, however, range from 26 to 28 million acres for the Prairie Provinces, contrasted with 23 million last year. Normally, the three Prairie Provinces account for about 95 per cent of Canada's wheat acreage.

At the Dominion-Provincial Conference in December, when production goals for the coming crop year were discussed, delegates suggested that the wheat acreage for the country remain at the 24 million acres reported for 1948. However, the increase in the guaranteed price to producers (now \$1.75 per bushel for top grade wheat), is expected to encourage larger seedings.

Weather conditions at seeding time will also, of course, be a determining factor on the total acreage sown. The season is starting with a definite shortage of soil moisture, according to recent reports. As a result, one of the factors affecting yields per acre in the Prairie Provinces is distinctly unfavorable.

Acreage of barley and oats is tentatively expected to be 5 to 10 percent below the 1948 acreage. Support prices for these grains are not high enough to make any shift from wheat attractive. On the other hand, present indications point to the bulk of any wheat acreage expansion as coming from other crops or summer fallow, rather than from barley and oats.

A sharp decline is expected in rye acreage. Last year's near-record production was 25 million bushels from the 2.1 million acres harvested. Supplies remaining in the country are unusually large and the price greatly reduced from last year's record level.

Tentative plans indicate that acreage of all three grains--wheat, barley and oats--will exceed the 1948 area in Manitoba where moisture conditions are most nearly normal of the Prairie Provinces. In Saskatchewan and Alberta, with a less favorable moisture situation, wheat is the only grain expected to reach the 1948 acreage.

AUSTRALIA REVISES WHEAT PRODUCTION ESTIMATE

Australia has revised its estimate of the 1948-49 wheat crop, which is now officially placed at 190 million bushels, compared with the record crop of 220 million bushels a year earlier. Both acreage and average yields were smaller than for the record crop. Though below the 1947-48 crop in volume, the quality of the grain is somewhat better than in that year, when heavy rains at harvesttime impaired the quality.

Latest estimates of the crop's probable disposition allow for domestic use of 60 million bushels, of which 38 million bushels would be for food and 22 million for feed. Allowance is made for about 18 million to be retained on farms for seed and other purposes. A carry-over of 18 million bushels would leave 120 million for export, taking into account the carry-over stocks at the beginning of the current season.

Seeding for the next crop is now beginning. Favorable weather conditions make the outlook good in eastern States. The outlook is not so promising in South Australia and Western Australia, however. The weather has been very dry in the wheat belt of Western Australia since the beginning of 1949. In South Australia there is also a deficiency of moisture, but good rains in February helped to relieve the dryness.

TROPICAL PRODUCTS

GOLD COAST'S 1948 CACAO EXPORTS LARGER

The Gold Coast's 1948 calendar year cacao bean exports of 432,905,000 pounds of cacao beans showed an increase of 9 percent over the unusually low 1947 cacao exports of 396,789,000 pounds, according to the American Consulate, Accra. In the prewar period 1935-39, the Gold Coast exported an annual average of 609,363,000 pounds of cacao beans.

GOLD COAST: Exports of cacao beans in 1948,
with comparisons.

Destination	Average 1935-39	1946 1/	1947 1/	1948 1/
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
Australia.....	15,705	24,241	16,984	19,275
Canada.....	5,293	34,160	11,390	19,779
Netherlands.....	57,891	36,736	11,738	17,750
Soviet Union.....	34	24,864	10,304	29,120
Sweden.....	6,897	7,168	3,741	20,026
Switzerland.....	363	-	3,550	14,060
United Kingdom.....	196,643	140,439	109,928	109,830
United States.....	166,363	200,879	165,388	162,512
Other.....	160,174	60,861	63,766	40,553
Total.....	609,363	529,348	396,789	432,905

1/ Preliminary.

Source: Gold Coast Trade Reports and U. S. Foreign Service reports.

The United States took 162,512,000 pounds of cacao beans from the Gold Coast in 1948, as compared with 165,388,000 pounds in 1947 and an annual average of 166,363,000 pounds from 1935 to 1939. The Gold Coast exported 109,830,000 pounds of cacao beans to the United Kingdom in 1948, as compared with 109,928,000 pounds in 1947 and a 1935-39 annual average of 196,643,000 pounds. The Soviet Union was the third largest importer of Gold Coast cacao in 1948 and other important purchasers were Sweden, Canada, Australia, the Netherlands, and Switzerland.

**VENEZUELA' 1948 COFFEE EXPORTS HIGHER;
1948-49 PRODUCTION SLIGHTLY LARGER**

Venezuela's 1948 calendar year coffee exports of about 575,000 bags represented an increase of 13 percent over 1947 exports of 508,000 bags. Trade sources in Venezuela now estimate the 1948-49 Venezuelan coffee crop at 800,000 bags as compared with a 1947-48 production of 779,000 bags. In the prewar years from 1935 to 1939, Venezuela produced an annual average coffee crop of 940,000 bags and exported an average of 734,000 bags of green coffee annually, according to the American Embassy, Caracas.

The United States purchased nearly 85 percent of Venezuela's 1948 total coffee exports, as compared with less than 30 percent of the total in the prewar period 1935-39. Europe was Venezuela's chief outlet for coffee in prewar years, taking almost 69 percent of the total coffee exports during the years 1935 to 1939. In 1948, only 15 percent of Venezuela's total coffee shipments went to Europe, principally to Holland, Switzerland, and Belgium.

**VENEZUELA: Exports of green coffee in 1948,
with comparisons**

Destination	Average 1935-39	1946	1947	1948 ^{1/}
	bags	bags	bags	bags
United States.....	207,447	596,436	412,865	459,919
Other Western.....				
Hemisphere	7,193	-	511	7,319
Belgium.....	695	6,527	16,209	11,631
Netherlands.....	7,204	19,056	18,514	24,804
Norway.....	2,967	20,443	26,988	8,134
Switzerland.....	40	9,108	1,224	21,994
Other Europe.....	503,940	9,646	21,055	8,503
Other.....	3,818	-	10,835	1,444
Total.....	733,304	616,216	508,201	543,798

^{1/} January to November only.

Source: Estadística Mercantil y Marítima and U. S. Foreign Service reports.

Coffee is grown in 18 of the 20 states of Venezuela on an estimated 70,000 farms. Most of it is produced on small farms having less than 5,000 trees each. The average farm contains 13.6 acres devoted to coffee. Although insignificant in comparison with the value of petroleum exports, coffee maintains its place as the most important agricultural commodity exported from Venezuela.

The greatest handicap with which growers must contend is the scarcity and high cost of labor resulting from the growth of the high-wage petroleum industry, the heavy demand for labor by the Government's large scale public works program, and the steady drift of labor to urban industry and private construction. The smaller growers are not adversely affected by the labor situation, since they and their families provide all the labor necessary to harvest the coffee crop and transport it by mule to the nearest distribution point. However, they are in no position to expand production and improve the quality of their coffee crops, because of their remoteness from communications and transportation, their lack of contact with modern methods of growing and preparation of the coffee bean, and their dependence on the middle-man to finance and sell their crops.

In recognition of coffee's importance to the national economy, the Venezuelan Government is engaged in a program of assistance to coffee planters. The most important features of this program are as follows: (1) Improving the cultivation and preparation for market of the coffee bean; (2) setting a minimum price for each year's crop, at which price the Government promises to purchase directly from the coffee planters all coffee offered to it; (3) long and short-term credits to growers; and (4) an export subsidy. The most important accomplishment to date has been the increase in the percentage of washed coffee from 45 percent of total coffee exports from Venezuela in 1940 to 79 percent of 1948 exports.

LIVESTOCK AND ANIMAL PRODUCTS

U. K. INCREASES PRICES OF MEAT, CHEESE AND BUTTER

The Ministry of Food, through its Chancellor of the Exchequer, has announced increases in the retail prices of meat, cheese and butter. The average prices of all types of meat, according to the latest report, will be increased by 4d. (7 cents) per pound beginning April 24. Generally, the increase for the more expensive cuts will be more than 4d. (7 cents) per pound, and cheaper cuts less. Prices of canned corned meat will be increased from 1s.8d. (34 cents) to 2s.0d. (40 cents) per pound.

To assure distribution of the same quantity of meat on the ration as at the present, the value of the weekly ration, beginning April 24, will be increased from 10d. (17 cents) to 1s.1d (22 cents) per pound. The ration consists of 11 pennyworth (18 cents) of carcass meat and 2 pennyworth (3 cents) of canned corned meat.

Beginning May 22, the retail price of all cheese, contained in the weekly ration, will be increased from 10d. (17 cents) to 1s.2d. (24 cents) per pound. The retail price of butter also will be increased from 1s.4d. (27 cents) to 1s.6d. (30 cents) per pound.

CANADA REMOVES EXPORT CONTROLS. FROM MOST DAIRY PRODUCTS

The Canadian Government, according to a recent report, has announced the removal of export controls from all dairy products except cheese and butter. The order, which became effective April 12, 1949, provides that export permits are no longer required for liquid buttermilk, ice cream, ice cream mix, fresh milk or fresh cream, concentrated milk products, liquid whey and case in.

In the past, export controls on these products were necessary to conserve domestic supplies and to enable fulfillment of Canada's contracts with the United Kingdom. It also was necessary to restrict exports of these products because prices in the United States were substantially higher. The situation during recent months has been considerably changed and the prices for these products in the United States have dropped to or near the Canadian level. Even with all export restrictions removed, supplies of concentrated milk products are beginning to accumulate.

All cheeses will probably remain under export control, as long as Canada has export commitments to the United Kingdom. Export permits are expected to be granted almost exclusively for shipments against the United Kingdom contracts. Exports permits for butter will be granted rather freely and controls may soon be removed entirely. The relaxation of controls is not expected to increase the volume of exports of dairy products materially. The various United States sanitary and inspection requirements for fresh milk and cream may preclude or limit the imports of those products from Canada.

FATS AND OILS

MALAYAN EXPORTS OF COPRA AND COCONUT OIL FOR JANUARY BELOW LEVEL OF PREVIOUS MONTH

British Malayan exports of copra and coconut oil in January were lower than those of the last month of 1948. Copra imports, however, were larger than those of the month before, whereas the total of coconut oil imports, a negligible quantity, was smaller.

Copra exports from Malaya in January totaled 7,327 long tons which was 7 percent less than the 7,897 tons shipped in December. The volume, when compared with that of January of the year before, was more than 9 times as great. Most of the copra by far was shipped to Europe, with Norway receiving 1,550 tons. Small quantities were sent to Asia and Africa.

MALAYA: Copra exports and imports,
January 1949 with comparisons

(Long tons)

Country	Copra distribution			
	Average 1935-39	1948 ¹ / 1948 ¹	January 1948 ¹ / 1949	
<u>Exports</u>				
Czechoslovakia.....	652	500	-	800
Denmark.....	2,050	7,453	-	720
France.....	8,578	2,196	-	600
Italy.....	11,322	8,246	150	391
Netherlands.....	28,956	11,423	-	908
Norway.....	4,703	750	-	1,550
Poland.....	3,358	6,020	-	500
Sweden.....	1,850	13,738	500	900
United Kingdom.....	57,750	2,081	150	-
Other Europe.....	49,209	1,480	-	350
Morocco.....	493	1,873	-	300
Asia.....	3,977	2,664	-	308
Other countries.....	18,793	617	-	-
Total.....	191,691	59,041	800	7,327
<u>Imports</u>				
British possessions...	10,617	5,452	18	1,201
Indonesia.....	105,500	81,330	5,595	6,737
Other countries.....	2,134	882	-	12
Total.....	118,251	87,664	5,613	7,950

1/ Preliminary.

American Consulate General, Singapore.

MALAYA: Coconut oil exports and imports,
January 1949 with comparisons

(Long tons)

Country	Coconut oil distribution			
	Average 1935-39	1948 1/	January 1948 1/ : 1949 1/	
<u>Exports</u>				
France.....	100	2,194	-	137
Italy.....	20	8,149	-	405
Netherlands.....	822	3,488	50	10
Sweden.....	185	2,200	1,150	-
United Kingdom.....	8,857	3,333	2,043	-
Other Europe.....	290	4,245	700	-
Burma.....	3,908	3,827	200	27
Hong Kong.....	1,391	8,033	984	154
India.....	22,500	301	-	414
Indonesia.....	3,119	363	30	8
Iraq.....	-	937	45	338
Pakistan.....	-	2,112	-	842
Other Asia.....	1,772	485	137	88
Egypt.....	3,295	3,822	-	260
Other countries.....	850	4,787	45	114
Total.....	47,109	48,276	5,384	2,797
<u>Imports</u>				
British possessions..	16	175	38	10
Indonesia.....	328	2,856	302	1
Other countries.....	229	-	-	-
Total.....	573	3,031	340	11

1/ Preliminary.

American Consulate General, Singapore.

Imports of copra into Malaya in January totaled 7,950 tons which was somewhat greater than the 7,629 tons imported in the previous month. The quantity imported in January was over 40 percent greater than the volume imported in January of the year before. About 85 percent of the tonnage imported came from Indonesia, and nearly all the remainder from British possessions.

Malayan exports of coconut oil in January amounted to only 2,797 tons. This represented a sharp drop--about one-third---from the 4,255 tons exported in December. In comparison with shipments in January of the previous year, the tonnage exported was slightly more than half. Over one-third of the coconut oil exported was sent to Pakistan and only small quantities were sent to Europe.

Malayan imports of coconut oil in January again were negligible.

CANADA'S LARD AND TALLOW PRODUCTION IN 1948
GREATER THAN IN PREVIOUS YEARS 1/

Lard production in Canada in 1948, according to an official estimate just released, was 44,190 short tons. 2/ This estimated quantity - which includes commercial output, lard produced on farms, in small plants, and lard not otherwise reported - was 14 and 11 percent greater than the volume produced in 1947 and 1946, respectively.

Imports of lard into Canada normally are negligible. They were up sharply, however, in 1946 and 1947 when they totaled 2,500 and 6,850 tons, respectively. In 1948 imports dropped back to about 18 tons. Exports in 1948 of 285 tons were about the same as in 1946 and 1947. The total amount available for domestic consumption at 43,920 tons in 1948 was the lowest in several years, with the exception of 1946 when there were 41,550 tons. However, the average amount available for consumption in the years 1935-39 was only 21,770 tons.

Production of tallow in 1948, both edible and inedible, is estimated at 43,803 tons. This is an increase of 8 percent over the 40,517 tons produced in 1947 but 2 percent less than production in 1946. Canada's production of tallow for each of the last 4 years is shown in the following table:

(see table on following page)

1/ Based in part on a report from the American Embassy, Ottawa.

2/ Estimate not received in time to be included in "World Lard Production Survey" in Foreign Crops and Markets, April 25, 1949. Estimate of Canadian output as given in that article was based on commercial production only.

Tallow Production, Edible and Inedible, in Canada
Annual 1945-1948

Year	Edible	Inedible	Total
	Short tons	Short tons	Short tons
1945.....	16,507	32,930	49,437
1946.....	14,582	30,189	44,771
1947.....	12,388	28,129	40,517
1948.....	12,792	31,011	43,803

Imports of tallow in 1948 at 9,059 tons were in greater volume than for several years, substantially exceeding the 6,099 tons imported in 1947 and the 5,741 tons imported in 1946. The source of these data does not indicate how much of the tallow was edible or inedible. The 1948 imports were comprised of 5,530 tons from Argentina and 3 tons from the United States, the remainder coming from Australia. The United States supplied the entire amount in 1947. Exports of tallow in 1948, only 371 tons, went mostly to the United States. An estimated 52,300 tons of tallow was available for domestic consumption in 1948, the largest supply since 1945 when over 57,000 tons was available.

Both lard and tallow prices have tumbled since the peaks were reached last year. The average wholesale price for lard in 1948 was 25.5 cents per pound in tierces, delivered at Toronto. This was the highest annual average price since 1920. By the end of March 1949 the price had dropped to 15.5 cents per pound. Similarly wholesale tallow prices, which in 1948 averaged 11.9 cents per pound (inedible prime packers tallow at Toronto), had dropped to 5.75 cents per pound by March 24, 1949 and to 5.25 cents per pound by March 31.

COTTON AND OTHER FIBER

COTTON CONSUMPTION
DECLINES IN SWITZERLAND

Switzerland raw cotton consumption is reported to have declined from 140,000 bales in the 1947-48 season to the present rate of near 120,000 bales per year, according to O.B. Moussman, Foreign Service Clerk, American Consulate, Zurich.

This decrease in consumption resulted mainly from the country's inability to reach the prewar volume of exports of cotton goods which, in the calendar year 1948, amounted to only one-third the 1938 cotton textile exports. Fine and fancy cotton piece goods are classed as non-essentials by many soft currency countries. These countries are also endeavoring to save hard currencies by importing more raw cotton and less cotton yarns.

The inevitable result is that Switzerland, in planning for 1949, has been forced to reduce its output both of cotton yarns and of fabrics.

Cotton consumption in the first half of the 1948-49 season (August through January) was reported at 67,700 bales (500 pounds gross weight). Stocks of cotton in Switzerland on January 31, 1949, were reported at 84,000 bales, a slight reduction from the 90,000 bales reported at the beginning of the season on August 1, 1948. Stocks of 6 to 9 months' supply are considered normal in Switzerland as the specialty type of textile manufacturers requires a reserve of many types of cotton.

Imports of cotton during the first 7 months of the 1948-49 season (August through February) show that about 42 percent or 32,600 bales of the total were obtained from the United States. This compares with 4,400 bales received from the United States during the entire 1947-48 season and is the highest level in the postwar period. The heaviest imports from the United States arrived in December, January, and February when 28,000 of the 32,600 bales were imported.

Officials of the Swiss Cotton Importers Association believe that if prices of United States raw cotton remain favorable, the United States will continue to be Switzerland's main source for cotton.

Imports of raw cotton from Egypt fell from 39,000 bales in 1947 to 22,000 bales in 1948. The figure would have fallen even more if the Egyptians had not agreed to let Swiss spinners buy Karnak from government stocks at reduced prices and the price of other growths had not temporarily declined during 1948.

Imports from Pakistan and India have practically stopped in the first 7 months of the 1948-49 season. Peru has been a major source of Swiss cotton supplies. Old-crop cotton in Peru, however, is practically exhausted and new-crop supplies will not be available before May or June. Peruvian prices are relatively high but most of the 15,500 bales imported so far this season were purchased at an earlier date at much lower prices.

Arrivals of cotton from Brazil have practically stopped in the past few months. Prices of Brazilian cotton are considered too high and old-crop cotton scarce. Imports of Mexican cotton are also below those of previous years due to export restrictions imposed by the Mexican Government.

The Belgian Congo has shipped 5,000 bales of cotton to Switzerland so far this season but imports from this source are expected to decrease as Belgium needs this cotton for home consumption.

The present demand is for cheaper, coarser fabrics calling for shorter staple. This fact, acting in combination with unusually high raw cotton prices on world markets, indicates that the United States will maintain its present level of exports to Switzerland. However, import demand has

fallen to approximately 120,000 bales a year and some of the more pessimistic spinners fear it may decline still more. Domestic demand for cotton piece goods and manufactures apparently is being fully satisfied. Despite strenuous efforts in negotiating bilateral trade agreements, Switzerland has been unable to increase its export quotas of cotton yarn and piece goods to soft currency countries. The general tendency on the part of mill owners is to reduce production, draw on stocks on hand, and await further developments rather than buy at unprofitably high prices.

INDIAN HESSIAN LOOMS SEALED

Curtailment of hessian production in India up to 12-1/2 percent is permitted by a recent agreement between the Government of India and the jute industry, according to recent reports from Foreign Service officers. Although the results of the special meeting were inconclusive, the discussions were apparently responsible for a later decision by the Government to accede to the requests of the mills.

The price of jute manufactures has been fluctuating considerably, and a sharp break in prices followed the closing of the conference without a definite decision as to the curtailment of hessian manufacture. Raw jute prices have held more steady. This steadiness is reported to result from there being no longer any futures market for raw jute.

The Government of Pakistan has sanctioned for 1949 an increase of 12-1/2 percent over the acreage planted in that country in 1948 and the new crop is expected to be larger than the last one. The increase predicted by trade sources, as reported in Foreign Crops and Markets, of April 25, probably was based on rumors that the increased acreage would be allowed.

The paragraph on jute production, as written last week, erroneously reported all production figures in millions of pounds instead of billions of pounds. All other figures in both text and tables of this article were correctly reported. The paragraph should read as follows:

"Although production reached 3.4 billion pounds in 1947 the 4 preceding crops had been so small that they averaged only 2.7 billion pounds annually. Wartime production (average 1941-45) was less than 2.9 billion pounds annually, or only about 85 percent of the prewar average, and postwar production has averaged only 86 percent of the prewar figure. Production in 1949 has been forecast by trade sources in India at about 2.4 billion pounds in Pakistan and 0.84 billion in India, making a total of about 3.24 billion pounds from the combined areas."

COTTON-PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the
U.S. gulf-port average

Market location, kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
<u>Alexandria</u>		: Kantar	:	:	:
Ashmouni, Good.....	4-28	: 99.05 lbs.	: Tallari	: 47.75	: 39.84
Ashmouni, F.G.F.....	"	: "	: "	: 45.50	: 37.96
Karnak, Good.....	"	: "	: "	: 67.45	: 56.28
Karnak, F.G.F.....	"	: "	: "	: 64.45	: 53.77
<u>Bombay</u>		: Candy	:	:	:
Jarila, Fine.....	"	: 784 lbs.	: Rupee	: 620.00	: 23.86
Broach, Fine.....	"	: "	: "	: 650.00	: 25.01
Kampala, East African.....	"	: "	: "	(not available)	
<u>Karachi</u>		: Maund	:	:	:
4F Punjab, S.G., Fine.....	4-27	: 82.28 lbs.	: "	: 88.00	: 32.27
289F Sind, S.G., Fine.....	"	: "	: "	: 94.50	: 34.65
289F Punjab, S.G., Fine....	"	: "	: "	: 98.00	: 35.93
<u>Buenos Aires</u>		: Metric ton	:	:	:
Type B.....	4-28	: 2204.6 lbs.	: Peso	: 3700.00	: 49.97
<u>Lima</u>		: Sp. quintal	:	:	:
Tanguis, Type 5.....	4-27	: 101.4 lbs.	: Sol	(not quoted)	
Pima, Type 1.....	"	: "	: "	: 490.00	: a/
<u>Recife</u>		: Arroba	:	:	:
Mata, Type 4.....	4-28	: 33.07 lbs.	: Cruzeiro	: 215.00	: 35.37
Sertao, Type 5.....	"	: "	: "	: 200.00	: 32.90
<u>Sao Paulo</u>		:	:	:	:
Sao Paulo, Type 5.....	"	: "	: "	: 207.00	: 34.06
<u>Torreón</u>		: Sp. quintal	:	:	:
Middling, 15/16".....	"	: 101.4 lbs.	: Peso	: 194.00	: 26.81
<u>Houston-Galveston-New</u>		:	:	:	:
Orleans av. Mid. 15/16"....	"	: Pound	: Cent	: XXXXX	: 32.42

Quotations of foreign markets reported by cable from U. S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

a/ No current exchange rates available. Using rates received in February and converting at 45% on the official rate and 55% on the free market rate, a price of 49.15 U.S. cents is derived.

WORLD POTATO SUPPLIES---(Continued from Page 411)

The large increases reported in Africa, North America and Asia, however, are not as significant in the total world picture as is the more moderate increase of 10 percent in Europe. This is because Europe including the Soviet Union, produces the bulk of the world's potatoes. The 1948 crop in Europe and Russia totaled 8.0 billion bushels or 39 percent of the world's 1948-49 crop of 9.0 billion bushels. In North America where surpluses of potatoes exist, only 6 percent of the world's crop is produced. Thus, it may be concluded that despite burdensome surpluses of potatoes in some countries the supply situation in the world as a whole (considering the 10 percent increase in population) is only slightly more on a per capita basis than prewar.

Nearly all of the increase in production, compared with prewar, is the result of higher yields. The area planted has barely reached the prewar level. The 1948-49 crop of less than 55 million acres was only 1 percent above the 54 million acres produced in the prewar period 1935-39. This means that the 1948-49 crop was produced under growing conditions considerably better than the prewar average. As a matter of fact the 1948 weather in most of the world was unusually favorable to potato production. World average yields in 1948-49 were 165 bushels per acre compared to 149 bushels prewar, 149 bushels in 1946-47 and 142 bushels in 1947-48.

In North America average yields in 1948 of 199 bushels per acre were 70 percent above the prewar average of 117 bushels. While production was up 28 percent from prewar, acreage was down 32 percent. In Europe yields were 208 bushels per acre or 18 percent above the prewar yield of 177 bushels. While production was up 14 percent, acreage was down 3 percent. In Asia there was little change in yields, in Africa a small increase and in South America a slight decrease. In some parts of the world potato yields have been increasing during recent years because of improved cultural practices, as well as favorable weather.

Unless these better than average conditions can be continued the potato crop another year will not be as large without further increase of potato acreage. This would mean either less potatoes for feed and industrial use or less than prewar per capita consumption for food. The former is more probable. Early indications point to a decline of potato production in several European countries in 1949. According to a recent report from the Netherlands a reduction of acreage may be expected in that country. The 1949 plan in the United Kingdom calls for 1,400,000 acres compared to the 1948 crop of 1,548,000 acres. In a recent report from France it is stated that the area planted to potatoes in 1949 may be 125,000 acres smaller than last year.

This is one of a series of regularly scheduled reports on world agricultural production prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C.M. Purves, Gustave Burmeister, Orval E. Goodsell, Constance H. Farnworth, Stanley Mehr, Mary E. Long, and John E. Hobbes.

WORLD GRAIN EXPORTS---(Continued from Page 406)

Approximately 73 percent of the world's grain exports during the first half of the current season consisted of breadgrains; namely wheat, including flour, and rye. The United States accounted for 55.6 percent of the total breadgrain exports. Coarse grains, namely corn, oats, barley and grain sorghums and millets, represented 27 percent of the world shipments during this period, with the United States accounting for 31.5 percent of the total.

Table 2. Destination of World Exports of Grain and Grain Products (July-December 1947 and 1948 in Grain Equivalent)

Period and grain	Countries of destination					
	Europe	Caribbean and Latin America	Africa	Asia and Pacific	Miscellaneous	All countries
	: Long tons	: Long tons	: Long tons	: Long tons	: Long tons	: Long tons
<u>First half 1947-48</u>						
Wheat.....	5,943,000	432,900	234,100	1,239,800	116,500	8,028,300
Wheat flour....	2,186,400	402,000	161,900	864,300	201,600	3,816,200
Rye.....	667,900	-	-	9,000	35,200	713,100
Total.....	8,797,300	834,900	396,000	2,113,100	356,300	12,557,600
Corn.....	2,115,400	18,000	51,400	406,800	135,000	2,726,600
Oats.....	197,800	24,000	8,000	5,700	17,800	253,300
Barley.....	835,600	47,000	9,400	336,800	28,800	1,257,600
Grain sorghums:	28,000	-	-	287,000	-	315,000
Total.....	3,176,800	89,000	68,800	1,036,300	181,600	4,552,500
All grains.....	11,974,100	923,900	464,800	3,149,400	537,900	17,110,100
<u>First half 1948-49</u>						
Wheat.....	6,596,700	337,400	548,500	1,650,400	25,200	9,158,200
Wheat flour 1/	1,425,300	719,100	108,300	1,133,000	213,900	3,599,600
Rye.....	259,000	-	-	-	51,000	310,000
Total.....	8,281,000	1,056,500	656,800	2,783,400	290,100	13,067,800
Corn.....	1,969,300	5,300	285,300	67,900	229,100	2,556,900
Oats.....	383,800	14,000	-	3,300	186,800	587,900
Barley.....	864,500	54,100	2,000	191,700	137,700	1,250,000
Grain sorghums:	202,000	-	-	274,000	-	476,000
Total.....	3,419,600	73,400	287,300	536,900	553,600	4,870,800
All grains.....	11,700,600	1,129,900	944,100	3,320,300	843,700	17,938,600

1/ Includes other wheat products (47,000 long tons) in 1948-49, most of it to European countries.

As in the 3 preceding postwar years, the bulk of the grain exports during the first half of the 1948-49 season was routed to areas of the greatest need in accordance with the programming operations of the International Emergency Food Committee and its Cereals Committee. This Committee's functions were discontinued April 19. European Countries took 65.2 percent

of the total, Asiatic and Pacific countries 18.5 percent, Carriibbean and Latin American countries 6.3 percent, African areas 5.3 percent and Miscellaneous 4.7 percent.

The total supply of grain, exclusive of rice, available for export from all surplus producing countries this season is now estimated at 38.0 million long tons. Last season, world grain exports totaled 34.6 million long tons. Largely because of better crops in the grain importing countries during 1948, export availabilities in the surplus producing countries will come closer to meeting estimated or stated import requirements of 43 million tons than in any year since the end of the war. It now seems reasonable to expect that the estimated export availabilities will be translated into actual shipments by the end of the season, but the eventual total will depend largely on the level of exports from the Soviet Union and Argentina during the last 6 months of the season.

L A T E N E W S

Oleomargarine production in Canada has been soaring since the Canadian Supreme Court rendered a decision in December legalizing its manufacture and sale. Production, starting from zero, was 1,030,000 pounds in January, 3,350,000 in February, 7,300,000 in March, and may reach 10,000,000 pounds in April.

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According to a Bulgarian Government decree, owners of arable land who, after receiving written notice from the local People's Council, do not carry out the sowing plan assigned to them, shall be deprived of their land for a period of 1 crop year. The land thus taken from such farmers is to be leased by the People's Council to the state agricultural farms, to the labor cooperative agricultural farms, to public farms and to certain private farmers. The money received from these leases shall be credited to the account of the State Land Fund.

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The area planted to cotton in Italy this year is officially estimated (preliminary) at 39,200 acres compared with a harvested area of 37,600 acres in 1948.

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The Mexican Government has removed its export controls on raw cotton as of April 14, 1949.

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The French Government has removed all price controls on textile fibers and articles at all stages of production and distribution, effective April 13, 1949. Production of textiles is now at least equal to the 1938 volume and stocks are sufficient to justify the removal of price controls.

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FOREIGN CROPS AND MARKETS

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